

## **CollegelInvest - 529 Employer Plan Advisor**

CollegelInvest is a not-for-profit division of the Colorado Department of Higher Education and is a trusted resource in providing 529 college savings plans, financial education and scholarships.

### **Job summary**

This position is responsible for developing relationships with Colorado employers to increase employee participation in direct deposit CollegelInvest 529 Savings Plans. This position requires an exceptional skill set to prospect new business, close new accounts, provide excellent customer service, research industry news and trends, and create effective marketing campaigns.

### **Essential Duties & Responsibilities:**

- Develop and grow existing customer base of Colorado employers
- Manage sales activities within ACT CRM database
- Market to Human Resource Directors with intent of enrolling them as new plan participants
- Conduct weekly professional and interactive sales presentations to C-Level executives and their employee base
- Schedule and arrange site visits/presentations
- Represent CollegelInvest at industry tradeshow, association meetings and at community events
- Manage independent budget/marketing expenses per job duties
- Report weekly status updates to Sales Director
- Develop and maintain in-depth knowledge of 529 industry and applicable changes to other college savings vehicles

### **Minimum requirements**

- Bachelor Degree (preferred Marketing emphasis)
- Ability to travel in-state day trips up to 50% of the time
- Prior ACT or similar CRM knowledge and utilization in the workplace
- Previous Sales Experience

### **Other Skills/Qualifications**

- Ability to multi-task and adapt to change
- Possess strong written and oral presentation skills
- Natural self-starter and leadership traits
- Excellent time management skills
- Ability to work independently as well as working well with others
- Familiar with Windows, Word, Excel, Power Point, Outlook, CRM software
- Strong interpersonal and communication skills
- Exceptional customer service follow through
- Passion to turn prospects into customer

**Application Procedure:** Submit resume to:

[jobs@collegeinvest.org](mailto:jobs@collegeinvest.org) or  
FAX to (303)292-1606 or  
Mail to  
Human Resource Manager  
CollegeInvest  
1560 Broadway, Suite 1700  
Denver, CO 80202

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